

Email & Automation Campaign Metrics Cheatsheet

A comprehensive cheat sheet covering essential email marketing and automation campaign metrics. Understand key performance indicators (KPIs) to optimize your email strategies and improve ROI.



Core Email Metrics

Delivery Metrics

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Delivery Rate	Percentage of emails successfully delivered to recipients' inboxes.
	Formula: (Emails Delivered / Emails Sent) * 100
Bounce Rate	Percentage of emails that could not be delivered.
	 Types: Hard Bounce: Permanent reason (invalid address). Soft Bounce: Temporary reason (full inbox, server down).
	Formula: (Bounced Emails / Emails Sent) * 100
Complaint Rate	Percentage of recipients who marked the email as spam.
	Formula: (Complaints / Emails Delivered) * 100
	High complaint rates can negatively impact sender reputation.

Engagement Metrics

Open Rate	Percentage of recipients who opened the email.
	Formula: (Emails Opened / Emails Delivered) * 100
	Subject line and sender reputation significantly influence open rates.
Click-Through Rate (CTR)	Percentage of recipients who clicked on a link in the email.
	Formula: (Clicks / Emails Delivered) * 100
	Indicates the relevance and persuasiveness of the email content.
Click-to-Open Rate (CTOR)	Percentage of recipients who clicked a link after opening the email.
	Formula: (Clicks / Emails Opened) * 100
	Focuses on the effectiveness of the email's content in driving clicks.

Conversion Metrics

Conversion Rate	Percentage of recipients who completed a desired action (e.g., purchase, sign-up) after clicking a link in the email. Formula: (Conversions / Emails
	Delivered) * 100
	Tracks the overall success of the email campaign in achieving its goals.
Revenue Per Email	Average revenue generated by each email sent.
	Formula: (Total Revenue / Emails Delivered)
	Provides insight into the profitability of email campaigns.
Return on Investment (ROI)	Measures the profitability of an email campaign relative to its cost.
	Formula: ((Revenue - Cost) / Cost) * 100
	Determines whether the email campaign is generating a positive return.

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Advanced Email Metrics

List Health Metrics

Segmentation Metrics

Automation Performance

List Growth Rate	Rate at which your email list is growing.
	Formula: ((New Subscribers - Unsubscribes) / Total Subscribers) * 100
	Indicates the health and expansion of your audience.
Unsubscribe Rate	Percentage of recipients who unsubscribed from the email list
	Formula: (Unsubscribes / Emails Delivered) * 100
	High unsubscribe rates may indicate irrelevant content or poor targeting.
List Churn Rate	Rate at which subscribers are leaving your list over a given period.
	Formula: (Number of Unsubscribes + Number of Bounces) / Total Subscribers) * 100
	Helps in understanding the overall health and retention of subscribers.

Segment Performance	Track open rates, CTRs, and conversion rates for different segments of your email list. Helps in understanding which segments are most engaged and responsive.
Personalization Effectiveness	Measure the impact of personalized content on engagement and conversion rates.
	Assess the effectiveness of using personalized subject lines, content, and offers.
A/B Testing Results	Compare the performance of different email variations (subject lines, content, callsto-action) through A/B testing.
	Identify the most effective elements to optimize future campaigns.

Percentage of contacts who complete an automation workflow. Indicates the effectiveness of the workflow in guiding contacts through a desired path.
Average time it takes for a contact to convert after entering an automation workflow. Helps in understanding the efficiency of the automation process.
Understand how automation contributes to overall revenue and conversions through attribution modeling. Determine the value of automation in the customer journey.

Email Deliverability Metrics

Sender Reputation

IP Address Reputation	A measure of the trustworthiness of the IP address used to send emails.
	ISPs use IP reputation to determine whether to deliver emails to the inbox or spam folder.
Domain Reputation	A measure of the trustworthiness of the sending domain.
	Domain reputation is affected by factors such as spam complaints, bounce rates, and engagement.
Authentication Protocols	Use of SPF, DKIM, and DMARC to authenticate emails and protect against spoofing.
	Proper authentication improves deliverability and protects sender reputation.

Inbox Placement

Inbox Placement Rate	Percentage of emails that land in the recipient's inbox versus the spam folder. Use seed lists and inbox placement tools to monitor inbox placement rates.
Spam Folder Placement	Track the percentage of emails that are being delivered to the spam folder. Identify potential deliverability issues and take corrective action.
Blocklist Monitoring	Monitor whether your IP address or domain is listed on any email blocklists. Promptly address any blocklist listings to maintain deliverability.

Engagement and Filtering

User Engagement Signals	ISPs consider user engagement signals (opens, clicks, replies) when filtering emails.
	Encourage recipients to engage with your emails to improve deliverability.
Feedback Loops	Implement feedback loops with ISPs to receive notifications of spam complaints.
	Address complaints promptly to improve sender reputation.
DMARC Reporting	Use DMARC reporting to monitor email authentication results and identify potential abuse.
	Take action to prevent unauthorized use of your domain for email sending.

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Analyzing and Improving Metrics

Tools for Metric Tracking

Utilize email marketing platforms like Mailchimp, Sendinblue, or HubSpot for built-in metric tracking.

These platforms provide detailed reports on delivery, engagement, and conversion metrics.

Implement web analytics tools like Google Analytics to track website conversions and attribute them to email campaigns.

Use UTM parameters to track traffic and conversions from email links.

Use dedicated deliverability monitoring tools to track inbox placement rates and sender reputation.

These tools provide insights into deliverability issues and help optimize email sending practices.

Strategies for Improvement

Improve Open Rates	Optimize subject lines, sender name, and preheader text to increase opens.
	Personalize subject lines and use compelling calls to action.
Increase CTR	Create engaging and relevant email content with clear calls to action.
	Use visually appealing designs and mobile-responsive templates.
Boost Conversions	Optimize landing pages and streamline the conversion process.
	Offer compelling incentives and

make it easy for recipients to complete the desired action.

Continuous Optimization

Regularly analyze email metrics and identify areas for improvement.

Conduct A/B tests to optimize email elements and improve performance.

Monitor sender reputation and deliverability to ensure emails are reaching the inbox.

Address any deliverability issues promptly to maintain a positive sender reputation.

Stay up-to-date with email marketing best practices and adapt strategies to changing trends.

Continuously refine email campaigns to maximize results.

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